



Fast, Flexible, Easy-to-use Software Solutions

The Filer Operators and Users Manual



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The Filer – Overview

The Filer allows you to create any number of Cabinets, Example EMPLOYEES Cabinet. The Filer Main screen has three main AREAS, the Index Area, the Attachments Area and the Sub-Folders Area.

Within Example EMPLOYEES Cabinet:

The Index Area - contains one record for each employee. Each employee is assigned a Employee Number and Employee Name.

The Attachments Area – contains two attachments for Ruth, Babe. A Contract and Employee Photo.

The Sub-Folders Area – contains four sub-folders, 2008 thru 2011. The Contract is within the 2008 sub-folder.

Index Area

Employee Number	Employee Name
00001	RUTH, BABE
00002	DILLANGER, JOHN
00003	SMITH, JOHN

Sub-Folders Area

Folder Tree

- 00001
 - 2008
 - 2009
 - 2010
 - 2011

Attachments Area

Date	Type	Description	Extended Description	File Code
08/30/2011	CONT	CONTRACT	NON-COMPETE	TIF
08/30/2011	PHOTO	EMPLOYEE PHOTO		FG

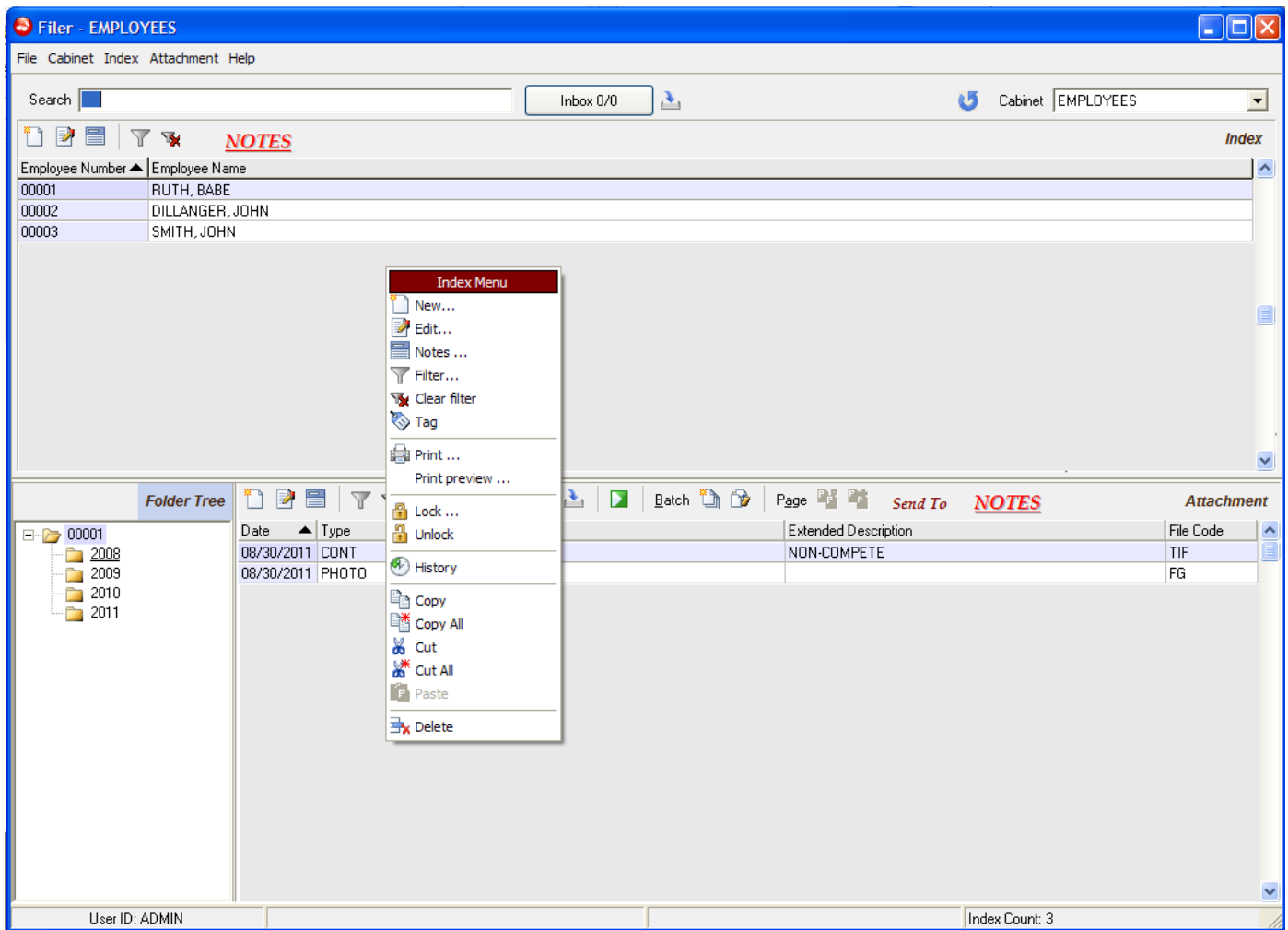
User ID: ADMIN Attachment Count: 0

The Filer – Index Area – Index Maintenance

The Index Area is where in the Example – EMPLOYEES Cabinet – Employees are added, edited, deleted. Were they are searched, and were Notes for each employee may be kept etc.

The Filer – Index Area – Add/Edit/Delete

The Index Menu is displayed by right-clicking while within the Index Area.



The Filer – Index Area – Menu Bar

The Index Menu is displayed by right-clicking while within the Index Area.



The Filer – Index Area – Add Index

Index Manager

The Index Manager dialog box for adding a new index. It features two text input fields: 'Employee Number' and 'Employee Name'. The 'Employee Number' field is currently empty, and the 'Employee Name' field is also empty. At the bottom of the dialog, there are three buttons: 'OK', 'Cancel', and 'Clear All'.

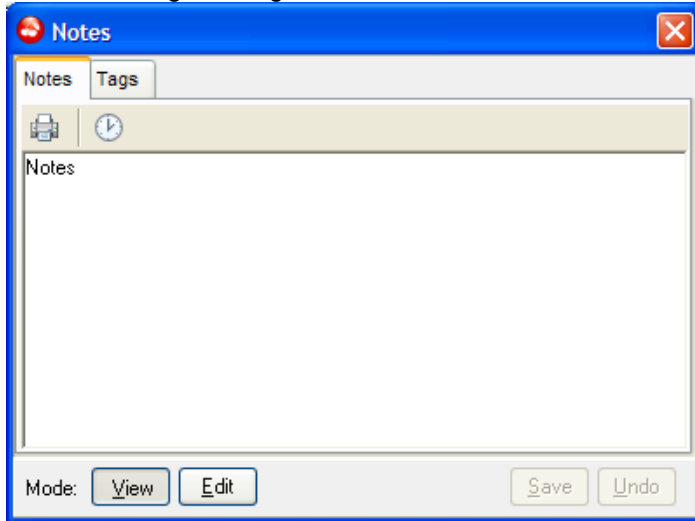
The Filer – Index Area – Edit Index

Index Manager

The Index Manager dialog box for editing an existing index. It features two text input fields: 'Employee Number' and 'Employee Name'. The 'Employee Number' field contains the value '00003', and the 'Employee Name' field contains the value 'SMITH, JOHN'. At the bottom of the dialog, there are three buttons: 'OK', 'Cancel', and 'Clear All'.

The Filer – Index Area – Index Notes and Tags

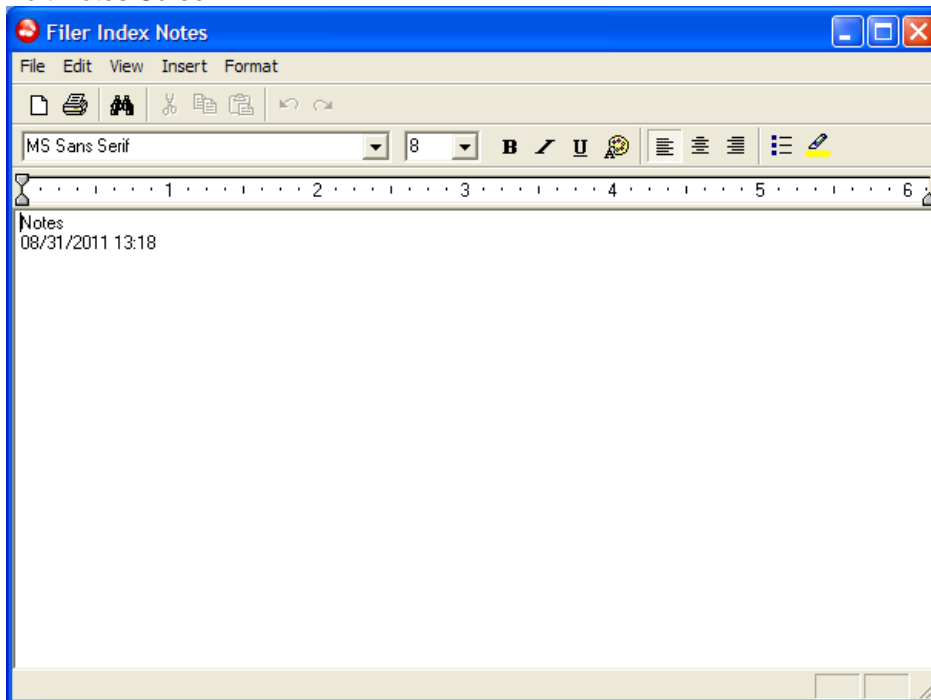
Notes and Tags Manager



When first opened the Notes and Tags Manager is set to View and Print mode.

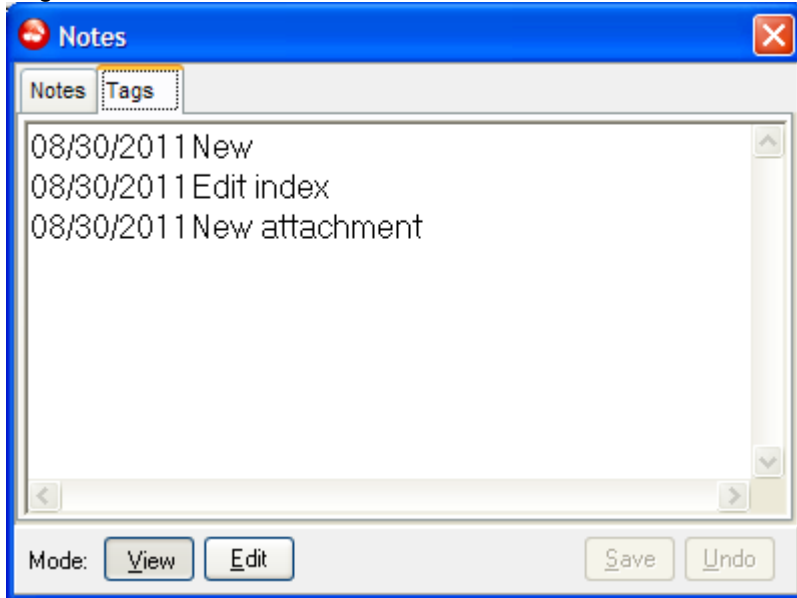
To Edit Notes: Either click Edit or click the Clock icon.
Click Edit will open the Edit Notes Screen.
Click Clock icon will insert the current date and time, and then open the Edit Notes Screen.

Edit Notes Screen



The Filer – Index Area – Index Notes and Tags

Tags Screen



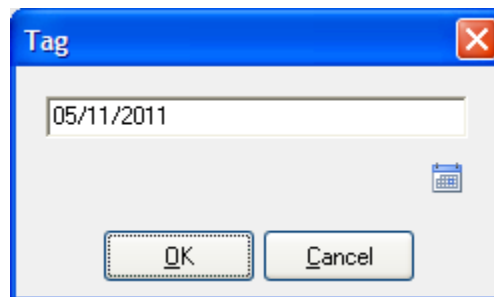
Click on Tags tab to open Tags Screen in View mode.

Tags are keyed by the operator and are assigned to the index. Tags assigned to Indexes. See Filter Indexes for more information regarding Tags.

See The Filer - Index Area – Search and Filter - for more information regarding Tags.

To update Tags, click on the Edit Button.

Select Tags from the right-click Menu, the following screen appears. The date is inserted by clicking on the small calendar. This function is handy when multiple indexes are to be tagged.

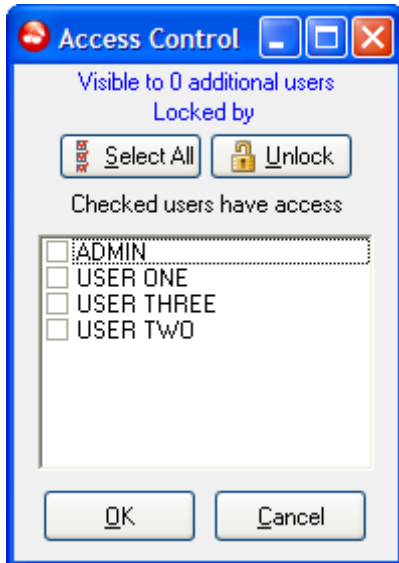


IMPORTANT Whenever an index is added or edited a tag of that event is automatically entered for that index.

The Filer – Index Area – Locking and Unlocking Indexes.

Locking and Unlocking Indexes allow Administrators or Cabinet Managers to hide selected Indexes from Edit or View only Cabinet users.

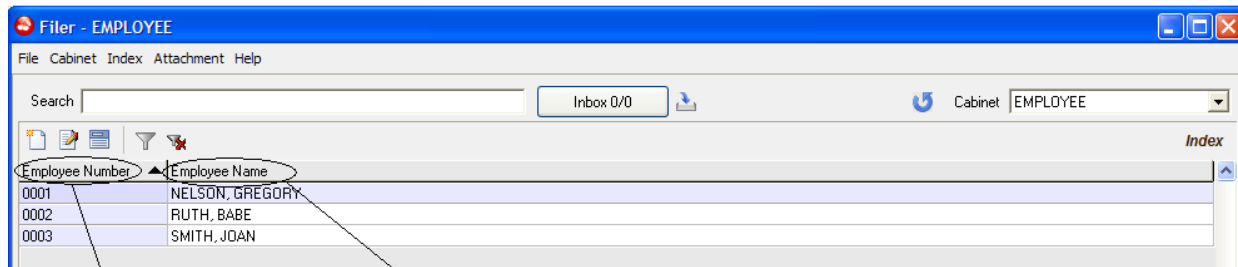
Access Control



The Filer – Index Area – Search and Filter

The Filer – Index Area – Search

When searching the indexes the order the indexes are displayed on the screen is controlled by clicking on the name of the field to sort by. For example: clicking on Employee Number will sort the indexes by Employee Number and clicking on Employee Name will sort the indexes by employee name

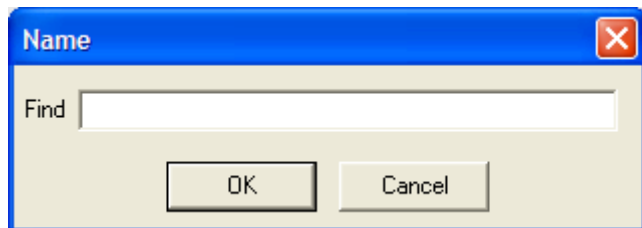


Click here to search by
Employee Number

Click here to search by Employee Name

Once the indexes are sorted, you may begin entering information into the Search field. As you key information within the Search field the indexes will be positioned to the values your keying.

The CNTL-F key will bring up a Search field. The system will then position you to the index when you click OK.

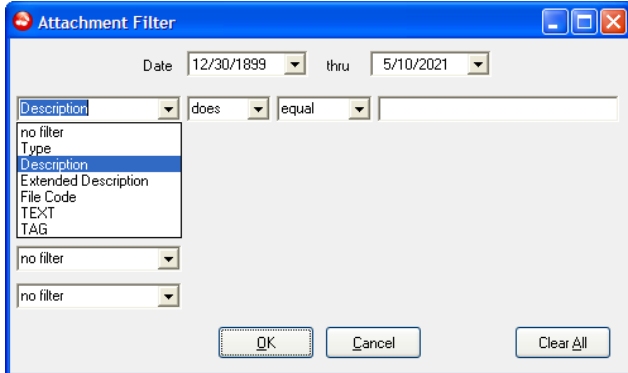


The Filer – Index Area – Filter

For Cabinets with several Indexes, it may be easier to find the indexes you are requiring by using the Filter feature. Note there is a Clear Filter button.

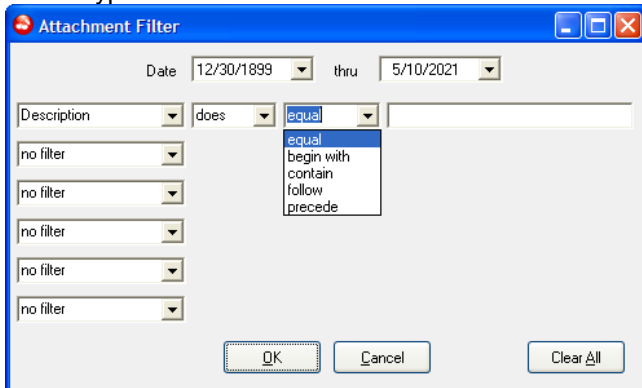
To Filter, click Filter Indexes icon, complete the following steps.

Select Index to be filtered.



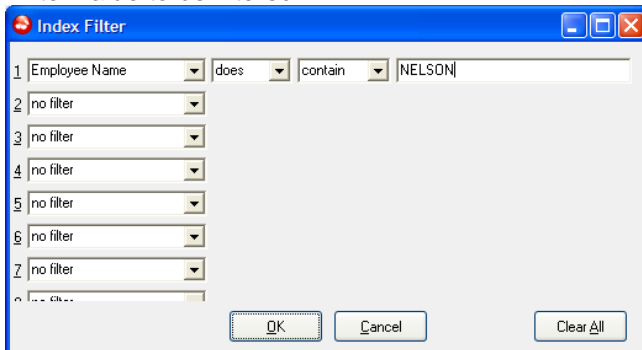
The Attachment Filter dialog box is shown. It has a title bar with a red close button. The main area contains a Date range from 12/30/1899 to 5/10/2021. Below this, there are three dropdown menus. The first dropdown is set to 'Description' and is open, showing a list of options: 'no filter', 'Type', 'Description', 'Extended Description', 'File Code', 'TEXT', and 'TAG'. The second dropdown is set to 'does' and the third to 'equal'. There are three buttons at the bottom: 'OK', 'Cancel', and 'Clear All'.

Select type of filtered.



The Attachment Filter dialog box is shown with the first dropdown menu open. The dropdown menu is open, showing a list of options: 'equal', 'begin with', 'contain', 'follow', and 'precede'. The 'equal' option is selected. The other dropdown menus are set to 'no filter'. There are three buttons at the bottom: 'OK', 'Cancel', and 'Clear All'.

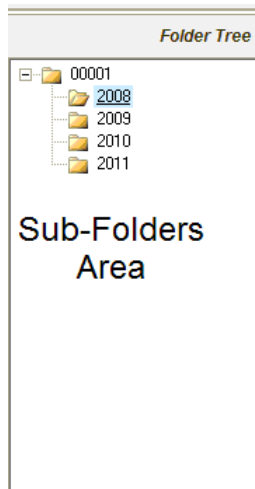
Enter value to be filtered.



The Index Filter dialog box is shown. It has a title bar with a red close button. The main area contains a list of indexes. The first index is 'Employee Name' and is set to 'does' and 'contain'. The value 'NELSON' is entered in the text box. The other indexes are set to 'no filter'. There are three buttons at the bottom: 'OK', 'Cancel', and 'Clear All'.

The Filer – Sub-Folder Area

Sub-Folder management within The Filer is very similar to folder management within Windows. The idea is to allow attachments to be placed within folders and subfolders.



The following Menu may be displayed by right-clicking within the Folder Tree window.

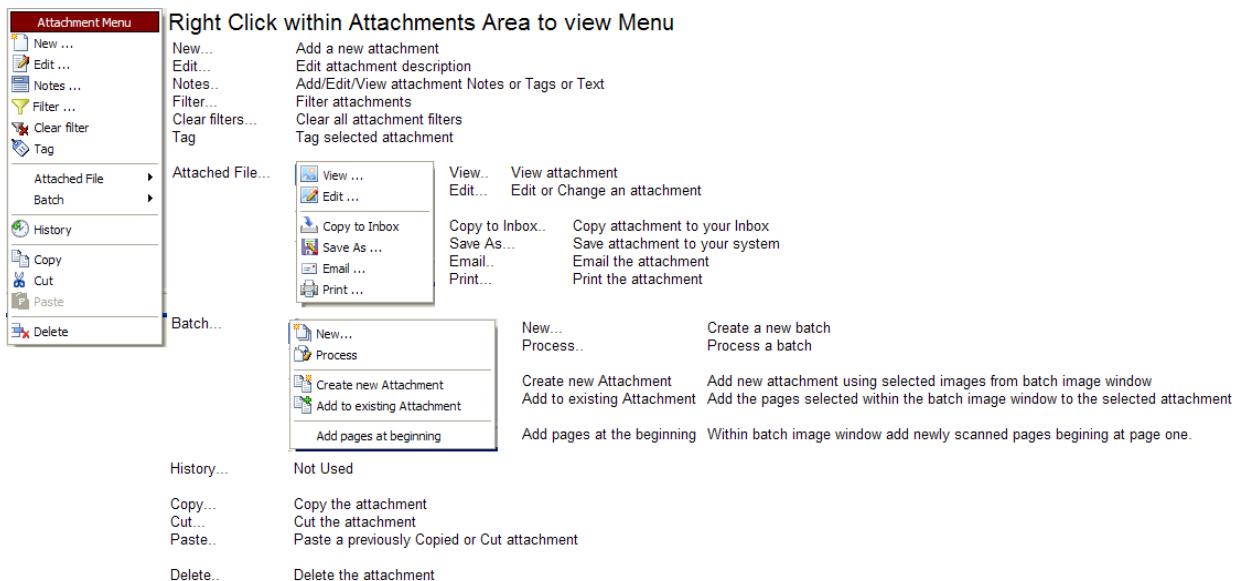
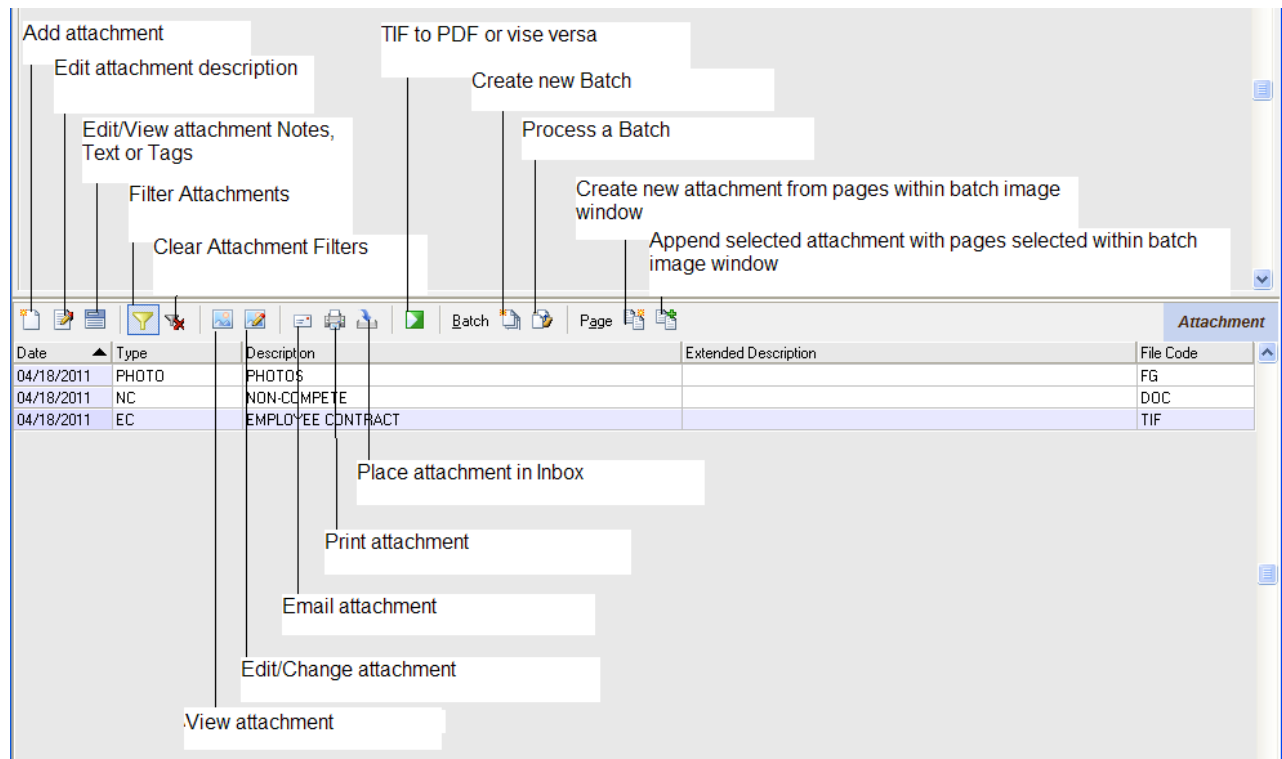
Folder Menu		Right Click within Folder Area to view Menu
New Subfolder	New Subfolder...	Add a new subfolder to within highlighted folder
Rename Subfolder	Rename Subfolder..	Rename the highlighted folder
Expand All	Expand All..	Expand all subfolders
Collapse All	Collapse All..	Do not display subfolders
Auto Expand All	Auto Expand All..	Set expand all subfolders as default for cabinet
✓ Show Subfolder Data	Show Subfolder Data..	Show the attachments for folder and all subfolders.
Reverse Sort		
Copy	Copy..	Copy subfolder and attachments
Copy Structure	Copy Structure	Copy the subfolder structure, but not the attachments
Cut	Cut	Cut the subfolder and attachments
Paste	Paste	Paste the subfolder and attachments or
Delete		Paste folder structure if Copy Structure was chosen

To display or not display Folders Area
go to File > Options, Check/Uncheck Show Subfolders

Note – The Copy will copy the folder and all of its attachments to be pasted elsewhere, where the Copy Structure will copy only the Folder Tree itself not all of the attachments.


The Filer – Attachments Area

Attachments are processed by using the buttons from within the Attachments Area or by right-clicking within the Attachments Area then choosing an option from the Menu. Not all of the attachment options are available by using the attachment buttons. Use the right-click Menu to perform options that not available as a button.



The Filer – Attachments Area – Add New Attachment

The following screen will appear when Add New Attachment is chosen.



The 'Attachment Info' dialog box contains the following fields and controls:

- Date:** A dropdown menu showing '4/20/2011' and an adjacent checkbox.
- Type:** A dropdown menu showing 'EQ' and an adjacent checkbox.
- Description:** A text input field containing 'EMPLOYEE CONTRACT' and an adjacent checkbox.
- Extended Description:** An empty text input field and an adjacent checkbox.
- Buttons:** 'Load File', 'Scan', 'Color/Photos', and 'Cancel' at the bottom.

Date: Date of the Attachment. If no date is chosen the system will default to the current date.

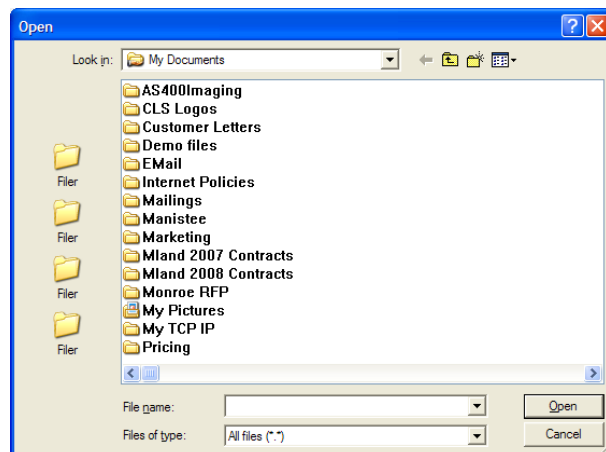
Type: Type is a code. The Filer remembers codes as they are entered. For new codes, The Filer automatically assigns the Description keyed to the code. The next time the code is keyed the assigned description is automatically displayed.

Description: Description of the attachment. The description is used to locate the document later.

Extended Description: Used to further describe the attachment.

IMPORTANT: Check the boxes next to the any of the fields listed above to assign that value as a temporary default.

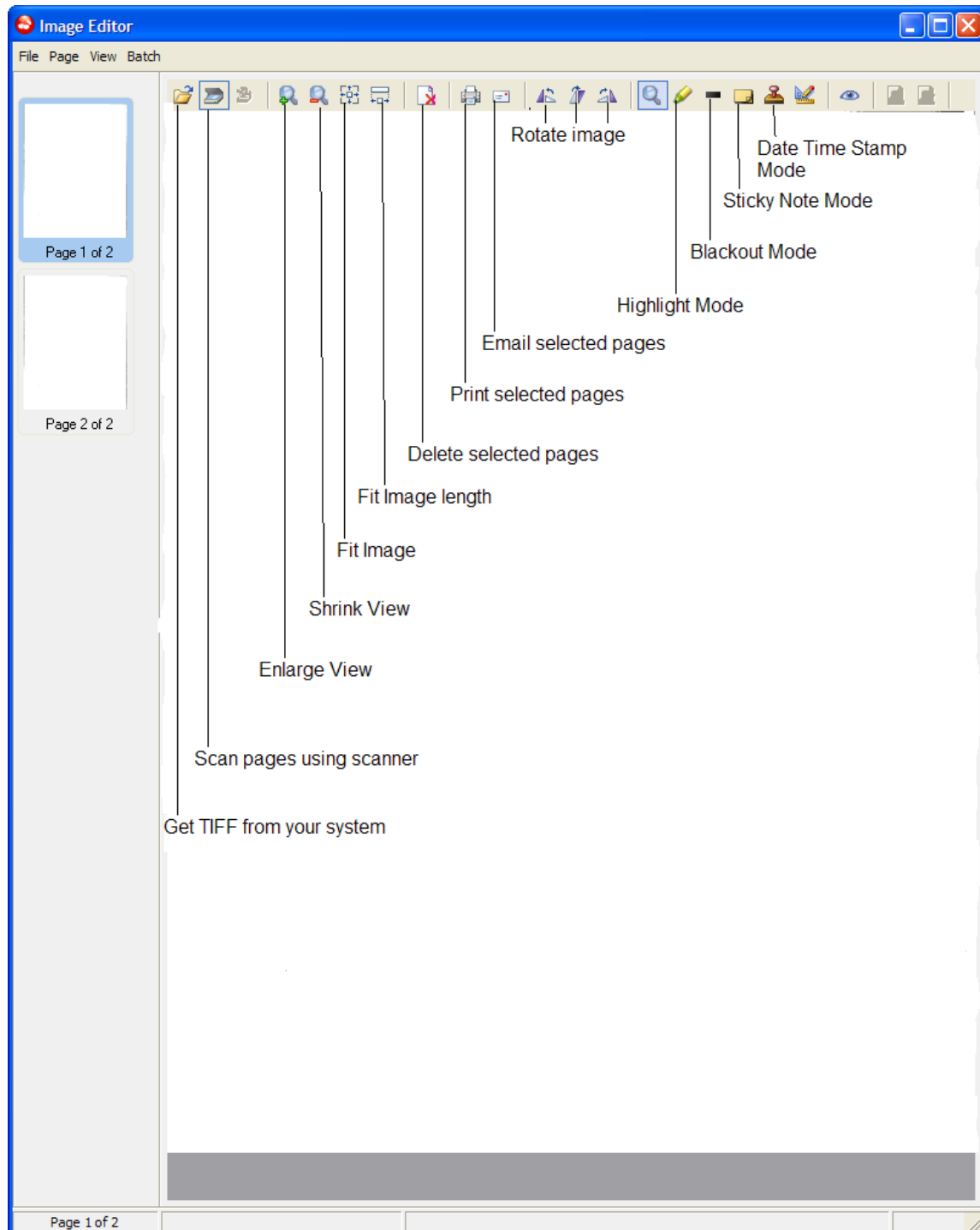
<Load File> Click on the Load File button to retrieve the attachment from your computer. Open Screen, similar to the one below will appear. Use for MS Word, Excel, Video, Audio Files and other electronic files.



The Filer – Attachments Area – Add New Attachment

<Scan>

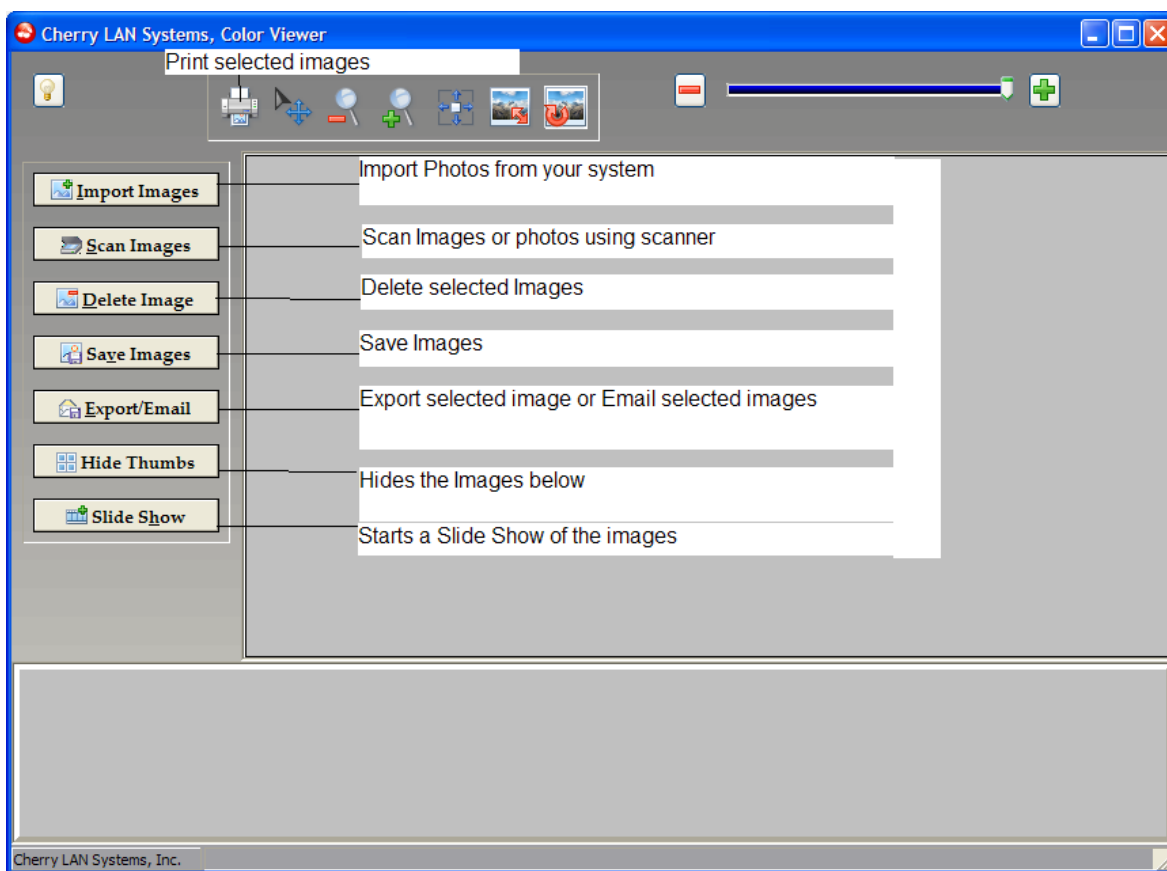
Scan an attachment using twain compatible scanner. The attachment will be a black and white multi-page TIFF attachment. The Image Editor will appear.



The Filer – Attachments Area – Add New Attachment

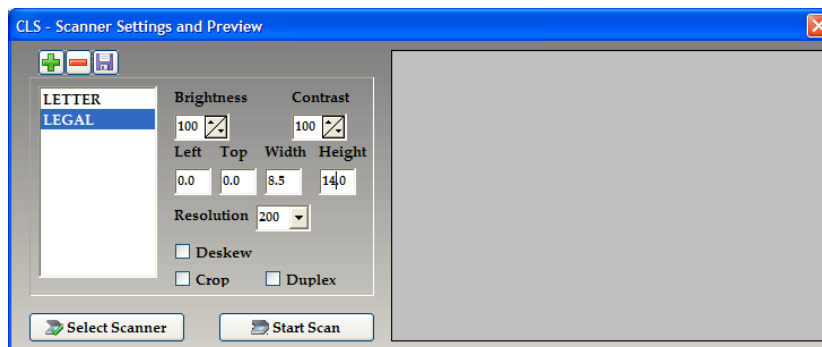
<Color/Photos>

Use this option when capturing photos or scanning color pages. A Cherry LAN Systems, Color Viewer screen similar to the one below will appear.



Chose Import Images to retrieve photos from your computer.

Use the Scan Images button to scan color documents.



The Filer – Attachment Area - Edit Attachment Description

The Attachment Date, Description or Extended Description of the attachment may be edited.

Attachment Info

A screenshot of a software dialog box titled "Attachment Info". The dialog has a blue title bar with a close button (X) in the top right corner. Inside, there are three main sections: "Date" with a dropdown menu showing "5/10/2011" and an unchecked checkbox; "Type" with a dropdown menu showing "BPA" and an unchecked checkbox; and "Description" with a text field containing "BUSINESS PARTER AGREEMENT" and an unchecked checkbox. Below the "Description" field is an "Extended Description" section with an empty text field and an unchecked checkbox. At the bottom of the dialog are two buttons: "OK" and "Cancel".

Date:	Key the date of the Attachment. If not date is chosen the system will default to the current date.
Type:	Type is a code. The Filer remembers codes as they are entered. For new codes, The Filer automatically assigns the Description keyed to the code. The next time the code is keyed the assigned description is automatically displayed.
Description:	Key the description of the attachment. The description is used to locate the document later.
Extended Description:	May be used to further describe the attachment.
IMPORTANT:	Check the boxes next to the any of the fields listed above to assign that value as a temporary default.

The Filer – Attachment Area – Notes, Text and Tags

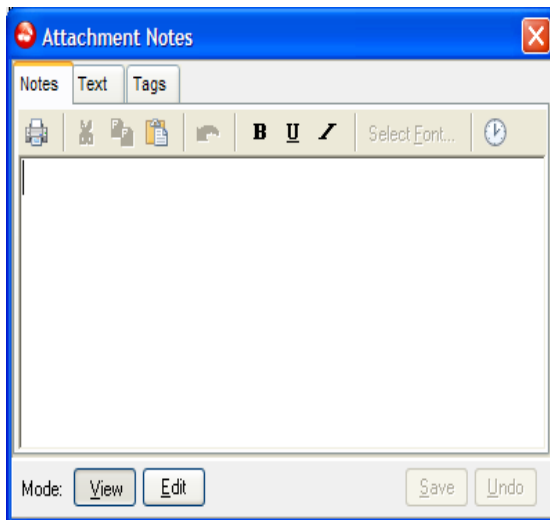
Each Attachment may have Notes, Text or Tags assigned.

Notes are keyed by the operator and are meant to provide extra information regarding the attachment.

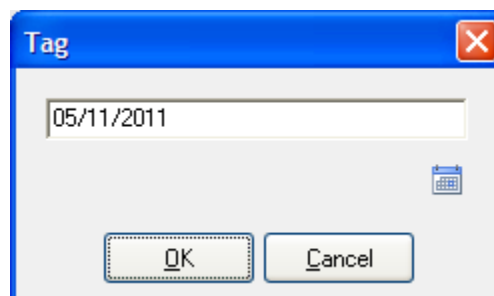
Text may be keyed by the operator or if the attachment is a TXT, DOC, TIF or PDF and The Filer engine has been registered properly. Click Help > Register Filer Engine. The Get Text button on the Text screen may be used to retrieve the text from the document. (OCR)

Tags are keyed by the operator and are assigned to the attachment.

Both the Text and the Tags may be used when attachments are filtered. See Filter Attachments.



To update Notes, Text or Tags, click on the Edit Button. When Tags is selected from the right-click Menu, the following screen appears. The date is inserted by clicking on the small calendar. This function is handy when multiple attachments are to be tagged.



IMPORTANT Whenever an attachment is added or edited a tag of that event is automatically created for that attachment. Also Tags may be entered by right-click Menu, and selecting Tag.

The Filer – Attachments Area – Filter Attachments

Should an Index have several attachments, it may be easier to find an attachment by Filtering the attachments. Click on Filter Attachments. Note there is a Clear all Filter button.

When Filtering first select the field you wish to filter. Then select the type of filter to be performed and finally key the value to be filtered.

The 'Attachment Filter' dialog box is shown. It has a title bar with a red close button and standard window controls. The main area contains a date range from 12/30/1899 to 5/10/2021. Below this, there are five filter criteria, each with a dropdown menu. The first dropdown, labeled 'Description', is open, showing a list of options: 'no filter', 'Type', 'Description', 'Extended Description', 'File Code', 'TEXT', and 'TAG'. The second dropdown is set to 'does', and the third is set to 'equal'. The other three dropdowns are set to 'no filter'. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Clear All'.

The 'Attachment Filter' dialog box is shown. The first dropdown menu is now set to 'Description'. The second dropdown menu, labeled 'does', is open, showing a list of filter types: 'equal', 'begin with', 'contain', 'follow', and 'precede'. The third dropdown menu is set to 'equal'. The other three dropdowns are set to 'no filter'. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Clear All'.

The 'Attachment Filter' dialog box is shown. The first dropdown menu is set to 'Description', the second is set to 'does', and the third is set to 'equal'. The text input field next to the third dropdown now contains the value 'EMPLOYEE'. The other three dropdowns are set to 'no filter'. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Clear All'.

The Filer – Attachments Area – View, Edit, Email

View Attachment

To view an attachment, select the attachment, then click on View Attachment or double click the attachment.

Edit Attachment

To edit an attachment, select the attachment, then click on the Edit Attachment button. Not all attachments may be edited. IMPORTANT – on the Menu bar select Cabinet > Manage Extensions, there you may decide which type of attachments may be Edited based on the File Type.

Depending upon the File Type a program will be called. For Word - MS Word will start etc. For TIF – The Image Editor will start, For Color/Photos the Cherry LAN Systems-Color Viewer will start.

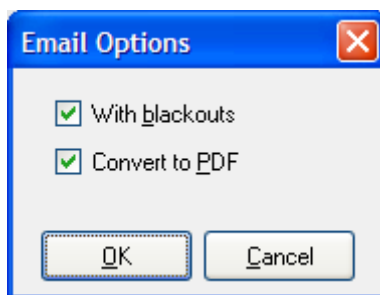
The purpose of the function is to allow the operator to insert pages, delete pages etc.

Email Attachment

To Email an attachment select the attachment(s) to be emailed, then click on the Email button. The first screen to appear is the Email Options. If the With blackouts option is chosen, then any blackout annotations placed on a TIF image using the Image Editor will remain on the Image.

Convert to PDF allows you to convert any TIF image created by the Image Editor to be converted to a PDF for Email.

The Filer engine must be registered properly. Click Help > Register Filer Engine.

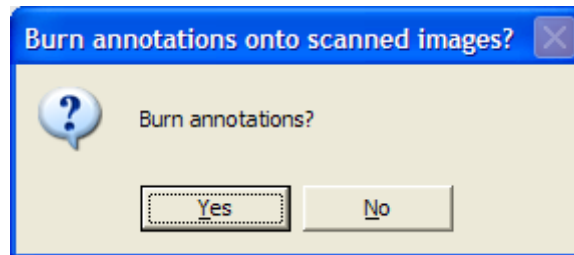


IMPORTANT The email program must be selected as your Windows default email before running. If it is properly assigned The Filer will automatically start your email program and automatically attach the attachment(s) selected.

The Filer – Attachments Area – Print, Inbox, Tif to PDF

Print Attachment

To print an attachment, click on Print Attachment button. . If Yes is selected on Burn annotations, then any blackout, notes, or other annotations placed on a TIF image using the Image Editor will remain on the Image



Place the attachment in your Inbox

Each user in The Filer is automatically assigned an Inbox. Click Attachment in your Inbox. Your Inbox may to used to send attachments to another persons Inbox, and attach documents to a different Index.

TIF to PDF or vise versa

This button will turn a PDF to a TIF image. This is important because most documents received within email are PDFs. In some cases the operator may wish to Edit (insert pages etc.) By turning the PDF into a TIF image, the Image Editor may be used to Edit the attachment.

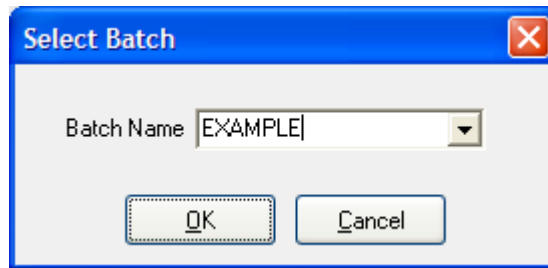
If the Attachment is a TIF, this button will turn this attachment into a PDF.

The Filer engine must be registered properly. Click Help > Register Filer Engine.

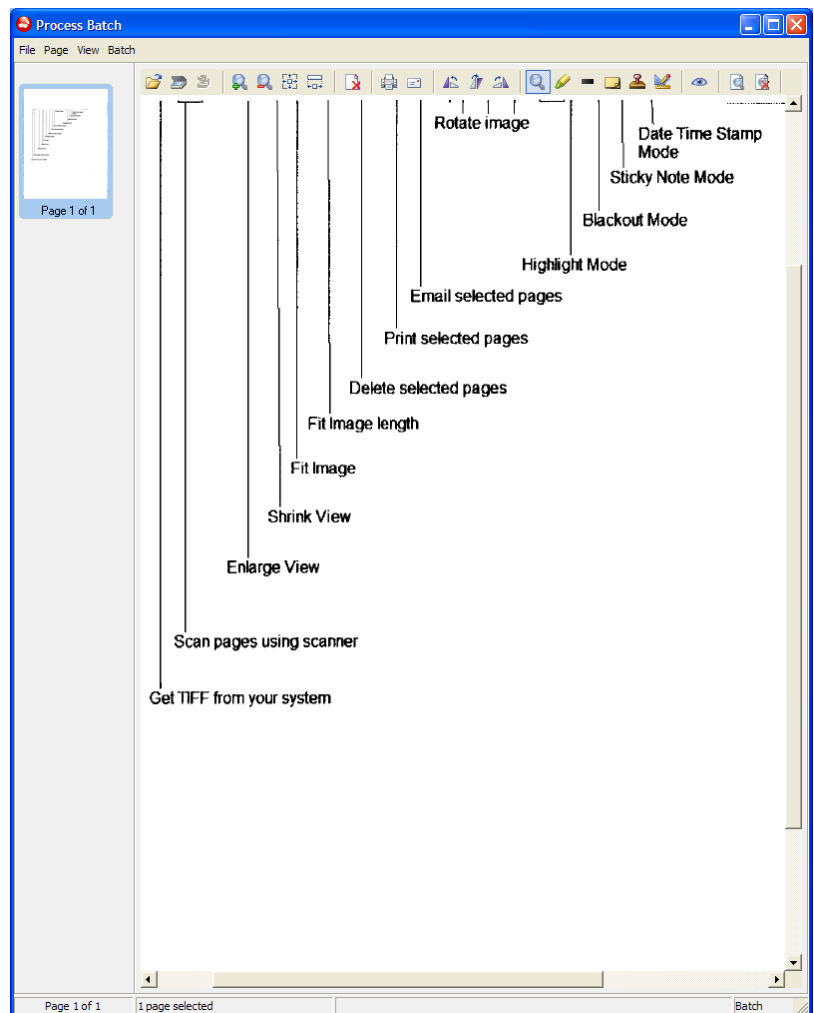
The Filer – Attachments Area – Create a new Batch

Create new Batch

The purpose of this feature is to allow the operator to scan multiple documents into The Filer and then Index and Attach the documents later. The following screen appears. Step one is to give the Batch a name.



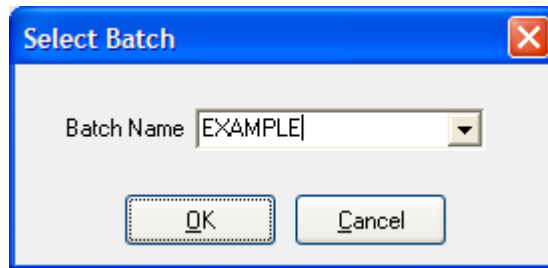
After the name of the Batch is entered the system will begin scanning the Batch. The follow screen appears.



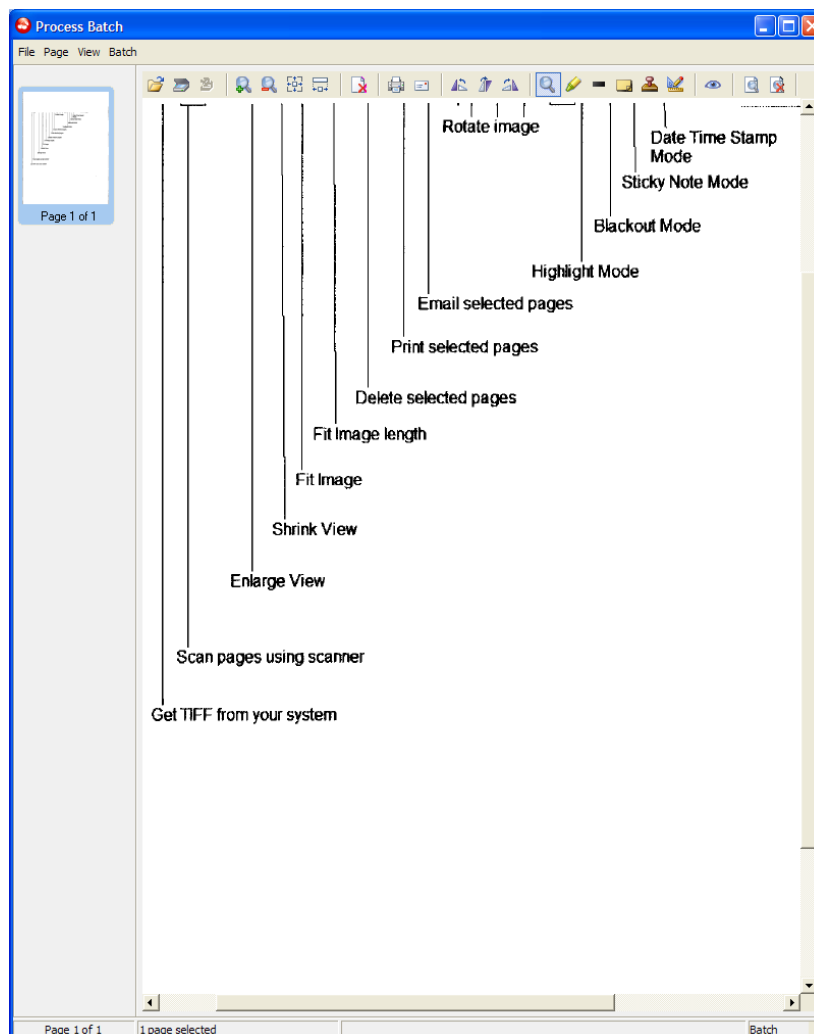
The Filer – Attachments Area – Batch Processing

Process Batch

To process a batch, click Process Batch, located on the attachment tool bar. The following screen will appear. Enter or select the batch you wish to process.



The follow screen appears.



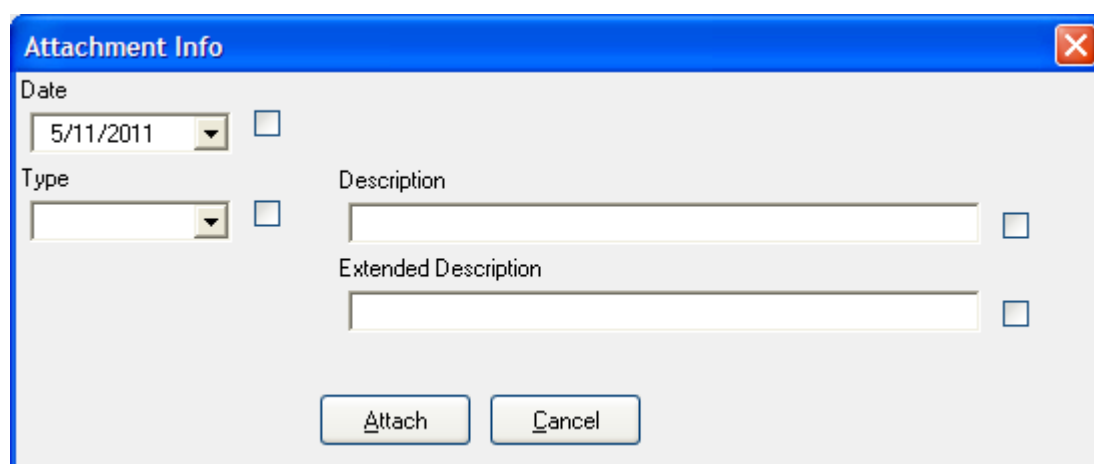
The Filer – Attachments Area – Batch Processing

Select the pages to be attached to an index or append to an existing attachment, then return to The Filer.

To create a new attachment from the pages selected.

Click on the Create new attachment from selected pages in image viewer button, located on the attachment tool bar.

The Attachment Info window will appear.

The image shows a Windows-style dialog box titled "Attachment Info" with a blue title bar and a red close button in the top right corner. The dialog has a light gray background. It contains several input fields: a "Date" field with a dropdown menu showing "5/11/2011" and a small square checkbox to its right; a "Type" field with a dropdown menu and a small square checkbox to its right; a "Description" field with a text input box and a small square checkbox to its right; and an "Extended Description" field with a text input box and a small square checkbox to its right. At the bottom of the dialog are two buttons: "Attach" and "Cancel".

Populate the necessary fields and click the Attach button.

To add pages to an existing attachment from a batch.

Select the pages in the batch window using the Shift/Cntrl selection feature. Then on the Filer window select the attachment you would like to add the pages to and click on the Add selected pages from image viewer button, located on the attachment tool bar.

IMPORTANT To delete pages from the batch as they are either attached or appended, On the Process Batch window, click on Batch, then check Delete pages.